

# CALIFORNIA REGIONAL ECONOMIES PROJECT

## *Regional Forum Planning Steps*

### **Background**

The following provides steps for planning regional forums for the California Regional Economies Project. This project, funded by the California Workforce Investment Board in partnership with the California Economic Strategy Panel, provides economic data and analysis and methods to use data for education, workforce and economic development planning and investments.

The primary data source is the Covered Employment and Wages program (ES 202) in the California Employment Development Department (EDD). The ES 202 data has been converted to the North American Industrial Classification System (NAICS), which groups the economy into 20 broad sectors, up from the ten divisions under the Standard Industrial Classification (SIC) system. The project examines changes in the economic base and industry clusters in nine regions from 1990 to 2002. Industry "clusters of opportunity" and employment and occupational opportunities emerge through this process.

A Consulting Team, led by Collaborative Economics, Inc. and including the Center for the Continuing Study of the California Economy and the California Center for Regional Leadership, provides the research, analyses and reports. The California Center for Regional Leadership is also responsible for organizing the regional forums.

### **Regional Forums**

The purpose of regional forums is to present the results of the economic base and industry cluster analyses, discuss the methodology used to complete the analyses and identify industry clusters of opportunity for more in-depth study. Users of economic data and analyses are the primary targets to participate in regional forums.

Local Workforce Investment Boards (Local WIBs) are the lead sponsoring organizations for the regional forums. In cases where service areas of Local WIBs cover more than one region, they will be able to participate in more than one regional forum. The planning process involves other users and providers of economic data and analyses such as economic development corporations, community colleges and other educational institutions, regional collaboratives, labor councils, business associations and EDD's Labor Market Information Division (LMID) field offices (See Attachment I for examples of Users of Economic Data and Analysis). The California Center for Regional Leadership (CCRL) and staff in the California Workforce Investment Board provide direction and assistance in the planning process.

## **Planning Process Roles and Responsibilities**

The following provides steps in the planning process and key roles and responsibilities.

- Local WIBs organize a planning committee to identify and work with key regional workforce and economic development partners on the forum planning.
- Local WIBs designate a lead contact person to coordinate the planning with the California Center for Regional Leadership and staff in the California Workforce Investment Board.
- Planning committee schedules the date and reserves a location for the regional forum for approximately 50 to 125 participants, depending on the region. The forum is approximately four hours, usually scheduled from 10:00 A.M. - 2:00 P.M., although the time can be flexible. The forum requires tables that seat six to eight participants each, a head table for employer panel participants, screen(s) and multimedia projector for power point presentations and audio system (See Attachment II, Regional Forum Logistics Checklist).
- Each Local WIB works with local partners to develop a list of invitees, including title, affiliation and contact information, which will be provided to the California Center for Regional Leadership and the California Workforce Association (CWA).
- Planning committee works with the California Center for Regional Leadership to select presenters for welcoming and introductory remarks and to develop an agenda.
- For name recognition, each Local WIB e-mails invitation and information sheet to their respective invitees (See Attachment III for samples of Invitation Letter, Agenda and Information Sheet). (A sample agenda also is attached which is provided in the information packet at the Forum). Additional information regarding the California Regional Economies Project is available at [www.labor.ca.gov](http://www.labor.ca.gov) under the Economic Strategy Panel and California Economy.
- Planning committee works with the California Workforce Investment Board to notify California Workforce Investment Board Members and key Legislators regarding the regional forum.
- Planning committee works with the California Center for Regional Leadership to identify and invite employers representing “industry clusters of opportunity” to participate on a facilitated panel discussion.
- Planning committee works with the California Center for Regional Leadership to arrange a lunch break that will be covered by charging \$15/person, collected at the door on the day of the forum.

## **Registration Process**

The California Workforce Association serves as the point of contact for registration. Participants can register on-line at [www.calworkforce.org](http://www.calworkforce.org). There is also a direct link to the registration site through the invitation if sent electronically. The California Workforce Association provides nametags and a list of registrants attending the regional forum. The California Workforce Association will also maintain a list of all invitees as well as conduct a survey evaluation of all participants at the regional forum. The California Workforce Association contact is Mike Wilbur at [mmwilbur@calworkforce.org/](mailto:mmwilbur@calworkforce.org/).

## **Regional Forum Presentations**

The Consulting Team provides copies of the final agenda, *Regional Economic Base Report*, *Regional Clusters of Opportunity Report*, and *Clusters of Opportunity Methodology Guide*. The Consulting Team will give power point presentations summarizing each of the reports and engages participants throughout the presentation. The Consulting Team also summarizes the proceedings of the regional forum and provides a summary report for interested parties.

## **Employer Panel Discussion**

After the Consulting Team presentations, a panel of 4-5 employers representing “industry clusters of opportunity” engages in a facilitated discussion to provide a qualitative analysis of the sector. The panel of employers addresses the following issues.

- Overview of the industry including firm profiles, key markets, trends, challenges and opportunities.
- Description of the workforce including number of employees, types of occupations and skills required, characteristics of the labor force including recruitment and source of labor.
- What are the implications of current conditions, challenges and opportunities for employees, such as skills gaps and other workforce-related issues and needs.

## **Regional Priorities**

After the employer panel discussion, the Consulting Team will lead participants in an exercise to identify industry clusters that are priorities for the region. Further studies will be conducted on industry clusters or regional issues identified by participants.

## **Contacts**

For additional information, contact Janet Maglinte, California Workforce Investment Board, (916) 324-3425 or [jmaglinte@cwib.ca.gov](mailto:jmaglinte@cwib.ca.gov); Don Perry, California Labor and Workforce Development Agency, (916) 322-3578 or [don.perry@labor.ca.gov](mailto:don.perry@labor.ca.gov) or Trish Kelly, California Center for Regional Leadership, (916) 448-2456 or [trish.kelly@comcast.net](mailto:trish.kelly@comcast.net).

## ATTACHMENT I

### USERS OF ECONOMIC DATA AND ANALYSIS

The following provides examples of uses of the data and analysis and types of users who would benefit from the California Regional Economies Project.

- Provide local general purpose government, councils of governments and other municipal bodies with timely information on employment growth and decline by industry statewide and in each economic region to help prepare targeted infrastructure investment plans and identify economic development priorities.
- Provide State and local employment training and education organizations with detailed information on high demand occupations by industry statewide and in each economic region to assist in the development of targeted workforce investment plans, curriculum development, school to career partnerships and industry sector initiatives.
- Provide State and local economic development organizations with an analysis of industry trends in employment growth and concentration by industry statewide and in each economic region to assist them in the development of successful local economic strategies.
- Provide human resource officers, employment agencies, labor councils and community services partners with timely information about changing industry needs and occupational demands to better serve employers and workers.
- Provide State and local business and industry associations and their members with an analysis of industry trends in employment growth and concentration for their industry statewide and in each economic region, to adjust their business plans to documented economic trends and conditions and assess workforce needs and gaps.
- Provide State and local research organizations and consulting firms with base line data for comparative studies on the employment growth and decline of key industries statewide and in each region to assess the potential causes for these trends and their impact on the economy statewide and by region.
- Provide the Legislature (at the State and district levels) and the Administration with the ability to track the economic impact of employment growth and decline on an ongoing basis, for informing policy debates about the state of the California economy and aligning state resources and policies to support regional strategies.
- Provide the general public, news organizations and opinion makers with accurate information about employment growth and decline by industry statewide and in each economic region to build a better understanding of economic trends and their implication for California workers, businesses and investors.

## **ATTACHMENT II**

### **REGIONAL FORUM LOGISTICS CHECKLIST**

The following provides a logistics checklist for regional forums.

- Facility conducive for interaction and dialogue and can accommodate lunch for participants.
- Facility location has easy access with plenty of parking (provide directions with invitation).
- Depending on the region, accommodate at least 75 people and up to 150.
- Area for check-in, preferably not in same room as the presentations and organize staff for check-in.
- Podium and microphone.
- AV - large screen(s) for power point presentation (needs to be large enough to see lots of numbers), laptop if possible for loading presentation in advance, multimedia projector and local IT support person.
- A table for approximately five employer panelists with microphones and name tents.
- Lavaliers and hand held microphones for Consulting Team and participants.
- Tables with room for six to eight persons each.
- Large wall space to post sticky blue sheet for posting comments from participants.
- Refreshments - Lunches have ranged from self-serve box lunch to buffet.
- Resource table for extra materials.

## ATTACHMENT III

### SAMPLE INVITATION LETTER

(Date)

\_\_\_\_\_ Regional Forum

The \_\_\_\_\_ (insert name of Local Workforce Investment Board) invites you to participate in a Regional Forum for the \_\_\_\_\_ Region to discuss new economic and labor market trends affecting our counties, learn how to work with new information and tools, identify emerging opportunities for growth and select an industry sector for further study. The Forum, co-hosted by the \_\_\_\_\_ Workforce Investment Boards in partnership with the \_\_\_\_\_, will be held on \_\_\_\_\_ in \_\_\_\_\_ from 10:00 A.M. to 2:00 P.M.

This event is the \_\_\_\_ of nine regional forums to be held statewide by the California Regional Economies Project. This project, funded by the California Workforce Investment Board, is in partnership with the California Economic Strategy Panel. The goal is to help provide better economic data and analysis for education, workforce and economic development planning and support for competitive regional strategies

We hope you can join us for this informative event. Please see the attached document for additional information about the project and how to register, as well as directions to the forum. If you have questions, please call (insert local contact person, telephone number and e-mail address).



## ATTACHMENT IV

### SAMPLE INFORMATION SHEET

#### REGIONAL ECONOMIC FORUM

*Date, 10:00 am to 2:00 pm*

Location

##### **Presented by:**

- California Workforce Investment Board
- California Economic Strategy Panel

##### **Hosted by:**

- Workforce Investment Board
- Workforce Investment Board
- Workforce Investment Board
- Workforce Investment Board

##### ***In partnership with:***

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#### ***Project Background***

This is the \_\_\_\_ of nine regional forums being held statewide by the California Regional Economies Project. The purpose of the project is to develop information that better measures the performance of California's regional economies, including the changes in the region's economic base, and identifies emerging opportunities for future growth. The \_\_\_\_\_ Economic Region includes the \_\_\_\_\_ counties of the \_\_\_\_\_. The project is led by a joint committee of members from the California Workforce Investment Board and the California Economic Strategy Panel, with funding by the State Board. (For additional information on the project see [www.commerce.ca.gov/economy](http://www.commerce.ca.gov/economy)).

#### ***Expected Results***

This forum will provide new information to enhance economic and workforce development planning and investments by local WIBs, economic development organizations, educational institutions and other partners. It will also provide a bridge connecting economic development to workforce policies, programs and resources at the state and regional levels. Participants will be provided with information on methodology tools, and will discuss which regional industry cluster the state could study in greater detail.



## ATTACHMENT IV

### SAMPLE INFORMATION SHEET

#### ***CREP Forum Focus***

The forum will be very interactive and feature:

- ✓ Presentations on the region's changing regional economic base, both cyclical and structural (using the new North American Industry Classification System - NAICS - from 1990-2002)
- ✓ Overview of updated regional industry clusters
- ✓ Methodology to identify emerging cluster opportunities
- ✓ Panel of business leaders to discuss how their industries are changing and the implications for workforce investment
- ✓ Audience discussion, with participants asked for their perspectives on the information presented, including additional sector for further study
- ✓ Handouts with all presentation information

#### ***Who Should Attend***

This forum is appropriate for workforce, education and economic development professionals, labor market analysts, economists, consultants, labor and other community partners, policy analysts, human resource officers and others who develop and/or use economic data for program planning, policy development, strategic planning, implementation initiatives, curriculum development, career counseling, proposal development and so forth. We encourage you to forward this invitation to others within your organization if it would be more appropriate for them to attend. We hope that someone from your organization will be able to join us.

#### ***How to Register***

Everyone who plans to attend must register. Please go to [www.calworkforce.org](http://www.calworkforce.org) to do so. You will find this event listed under "Conferences and Workshops," then click on "Training and Workshops."

You can also register by linking directly to the event:

NOTE: DIRECT LINK TO BE PROVIDED, or by calling Mike Wilbur at the California Workforce Association at 916.325.1617.

A registration fee of \$15 will be collected at the door to cover the cost of lunch and use of the facility.

**Please ensure your place by registering today. All registrations must be received no later than \_\_\_\_\_.**

*We look forward to seeing you at the important regional gathering! If you have any questions, please contact \_\_\_\_\_, phone or e-mail at \_\_\_\_\_*

**ATTACHMENT IV**

**SAMPLE INFORMATION SHEET**

                    , ***2004 CREP Forum Location***

***Address***

***Map***

***Driving Directions***

**ATTACHMENT V**  
**SAMPLE AGENDA**  
**CALIFORNIA REGIONAL ECONOMIES PROJECT**  
**(Date and Location)**

- 10:00** Welcome, Introductions, and Purpose of Forum (Planning Committee selects local representatives to give welcome and introductory remarks)
- 10:15** Regional Economy Report: Presentation and Discussion  
*Jim King, Action Research*
- 11:15** Regional Clusters of Opportunity: Presentation, Methodology, Panel  
*John Melville, Collaborative Economics*
- 12:00** Lunch
- 12:30** Employer Panel on Workforce Issues  
*Moderator: Jim King, Action Research*
- 1:30** Regional Priorities  
  
Participants write down reasons for choosing particular cluster(s) for further profiling, ideas are posted and summarized, with group discussion of results
- 1:55** Wrap Up and Next Steps  
  
*Ed Kawahara, Special Assistant to the Undersecretary, California Labor and Workforce Development Agency*
- 2:00** Adjourn